Individual seeks Navigator services prior to completing their account (no partnership created)

Once an individual has created a Washington Healthplanfinder account they have the ability to add a Navigator to their Dashboard to assist through initial enrollment and ongoing assistance. There will be many times when an individual comes to you for assistance without creating an account first.

When this happens the Navigator must complete the Create My Account and About You screens before a partnership can be created.

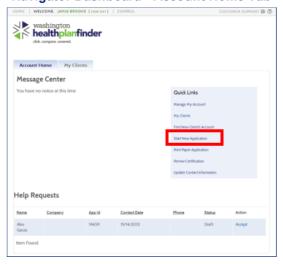
This is done by:

- 1. Logging into your dashboard
- 2. From your Account Home page click on Start New Application
- 3. Complete the Create My Account and About You Screens (see below)
- 4. After completing these 2 screens click on your name at the top left hand corner of the screen. This will take you back to your dashboard
- 5. Click on Find New Client's Account and fill in the required First Name, Last Name, SS# and DOB.
- 6. Click on Search, find the client and click on select
- 7. Complete the Confirmation to Partner with a Client screen (do this with the client present or with the client over the phone)
- 8. Finish the application
- 1. Logging into your dashboard



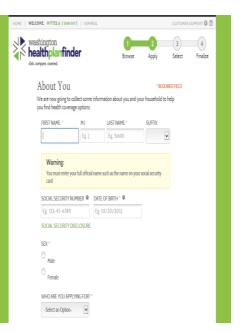
2. From your Account Home page click on Start New Application

Navigator Dashboard - Account Home Tab



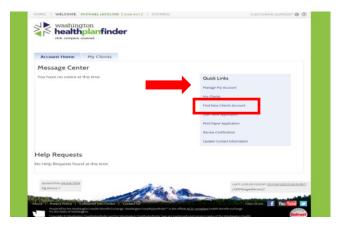
- 3. Complete the Create My Account and About You Screens
- 4. After completing these 2 screens click on your name at the top left hand corner of the screen.







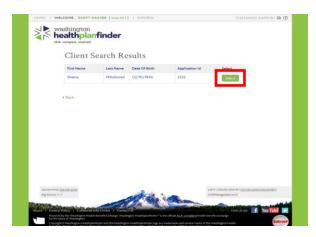
5. This will take you back to your dashboard. Click on Find New Client's Account.



6. Complete the required First Name, Last Name, SS# and DOB data fields and click on Search.



7. Find the client and click on select



8. Complete the Confirmation to Partner with a Client screen (do this with the client present or with the client over the phone) and proceed to finish the application

Confirmation to Partner with a Navigator

HOME WELCOME	AMIE SROOKS [SIGN OUT] ESPAÑOL	CUSTOMER SUPPORT (\$ (7)
washing health dick company.	planfinder	
Cor	nfirmation to Partner with a Client	
	about to become the Navigator for Alex Garcia. Please check the box below to have reviewed the following terms with the client:	v to indicate
	client agrees to disclose personal information, such as francial recourses wird flamplications on the production of the client as featurable and which are disclosed to the client and the client as featurable and information will not be further disclosed without their permission (Client grants the Navigator permission to access, certer, and update information in their online application. Client further grants permission to the Navigator to solven their completed application, including activating on Client undestand that they reasy end their partnership with the Navigator or charge their duration or notification preferences at any time through their Healthylarifinder account to by calling 1-800-X00X-X00X, their on-line account. Client understands that the imaximor pereviain on heir on-line account. Client understands that the imaximor pereviain they are gooted and that they accept will be charged to the account.	
WHA	T SHOULD BE THE DURATION OF YOUR RELATIONSHIP WITH ALEX GAI	RCIA? "
0 0	INGOING	
O F	OR INITIAL APPLICATION ONLY	
	WOULD YOU LIKE TO RECEIVE COPIES OF ALL WASHINGTON HEALTHPLANFINDER NOTIFICATIONS SENT TO ALEX GARCIA? "	
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To fo	rmally partner with this client, click "Partner" below.	
* No.		Distance